OVERVIEW OF RTO WEST STAGE 2 DEVELOPMENT PROCESS MONTHLY MILESTONES

JANUARY

General

1/30 Develop and Refine Work Plan and Process for Stage 2

Market Design Content Area

1/31 Develop Initial Written Materials for Content Groups to Use

1/31 Preparatory Work for FTR Allocation

Pricing Content Area

1/31 Develop Initial Written Materials for Content Groups to Use

Interfaces Content Area

1/9 - 1/30 Work Through Issues and Decide Whether BC Hydro Will Participate as a Filing Utility

1/12 (Ongoing) WIO/WMIC Seams Work

Tariff Structure/Contractual Framework Content Area

1/24(ish?) Analyze and React to FERC Order on Governance

1/31 Written Description of RTO Service and Draft of Filing Letter Request to FERC

FEBRUARY

General

2/1 - 2/28 Begin Content Group Meetings and Convene RRG as Necessary (Ongoing)

Market Design Content Area

2/15 Begin Initial FTR Allocation Process

2/15 Finalize Market Monitoring Details

2/20 Finalize Scheduling Provisions for Existing Non-Converted Contracts

2/28 Finalize Basic Congestion Management Model

2/28 Finalize FTR Design and Term Sheet

Ops./Planning/Imp. Content Area

2/15 Finalize Metering Content

2/1 - 2/28 Work on Various Planning Processes (including Market Driven Expansion Mechanism and Benefit/Cost Allocation of Expansion Decisions)

Pricing Content Area

2/1 - 2/28 Ongoing Work on Transfer Payments and Fixed Access Charges

Interfaces Content Area

2/14 Content of Canadian Participation Agreement To Be Finalized

Tariff Structure/Contractual Framework Content Area 2/1 Compile Suspension Agreement Exhibit Data

MARCH

Market Design Content Area

3/1 Review/Develop Ancillary Services ("AS") Penalties

3/14 Finalize Approach for AS Deployment

3/15 Determine Loss Methodology

3/23 Finalize Details Re Ongoing FTR Allocations

3/30 Finalize FTR Auction Specifics

3/30 Finalize AS Pricing Mechanisms

3/30 Finalize Requirements for External AS Market

3/30 Finalize Performance Standards for Each IOS, Self

Provision and Self Tracking

3/30 Finalize AS Purchase Processes and Timelines

3/30 Finalize Scheduling Coordinator Details

Ops./Planning/Imp. Content Area

3/1 Finalize Dispatch Treatment/Content

3/1 Finalize Outage Coordination Treatment/Content

3/15 Finalize Interconnection Standards

3/15 Finalize Website and Public Market Information Treatment/Content

3/29 Finalize Criteria for Maintaining Initial Transfer Capability

3/30 Finalize Content of Generator Provisions and GIA

3/30 Finalize Content of Load Provisions and LIA

3/1 – 3/30 Work on Update of Impl. Timeline and Costs

Pricing Content Area

3/15 Resolve any Facilities Issues

3/15 Finalize Paying Agent Agreement Content

3/30 Finalize Settlements and Billing

Provisions/Procedures

Interfaces Content Area

3/15 Finalize PNCA/Hourly Coordination Treatment

Tariff Structure/Contractual Framework Content Area

3/1 Finalize PTO Provisions Content

3/30 Finalize Dispute Resolution Content



OVERVIEW OF RTO WEST STAGE 2 DEVELOPMENT PROCESS MONTHLY MILESTONES

APRIL

Market Design Content Area

4/2 Finalize and Implement Initial Allocation Methodology

4/16 Develop IOS AS Obligations at RTO Startup

4/20 Finalize Scheduling Procedures

4/30 Determine Need for Market Power Mitigation Measures

Ops./Planning/Imp. Content Area

4/2 Finalize General Planning Details Needed for Tariff

4/16 Finalize Transmission Adequacy Standards

4/30 Finalize Process to Allocate Costs/Benefits of Expansion

4/30 Finalize Security Coordination Content

4/30 Finalize Implementation Content

4/30 Draft Scheduling Coordinator Agreement

Pricing Content Area

4/2 Compile and Release Master List of RTO Facilities

4/11 Finalize Details of Pricing Methodology

4/12 Reciprocity Agreements with Other RTOs

MAY

Market Design Content Area

5/7 Complete Initial Allocation of FTRs

5/7 Begin Market Design Validation and Testing

5/15 Finalize System Expansion and Grid

Interconnection Content

5/18 If Needed, Perform Market Mitigation Measures Analysis

Pricing Content Area

5/7 Finalize Transfer Payments and Fixed Access Charges

5/22 Determine Need for Further Analysis of Alternatives

5/29 Calculate Initial Estimated Company Rates

Ops./Planning/Imp. Content Area

5/15 Finalize Market Driven Expansion Mechanism

5/15 WIO/WSCC Interface (from Planning Perspective)

5/15 Finalize GIA/LIA

Tariff Structure/Contractual Framework Content Area

5/1 - 5/30 Drafting Work (Tariff, Contracts, Filing Letter)

5/7 – 5/29 Integrate all of the Filing Materials including

RTO West Tariff, Appendices,

Schedules, Additional Contracts, Filing Letter

5/15 - 5/31 Begin Filing Utility Internal Review of

Integrated Filing Package

JUNE/JULY

Market Design Content Area

6/1 Complete Market Design Validation and Testing

Tariff Structure/Contractual Framework Content Area

6/1 - 6/19 Complete Filing Utility Internal Review of Integrated Filing Package

6/19 Release Filing Materials for Regional Input on Integrated Package

6/19 - 7/3 Regional Review and Comment on Integrated Package

7/3 - 7/17 Consider Comments, Refine Filing, File with FERC

